

Personal data

Full name: Dossier no:
Date of birth: AVS no:
Marital status: Nationality(ies):
Street:
ZIP, city: Country:
Phone no : Private email:

Voluntary purchase

Have you made a voluntary purchase with a pension fund in the last three years?

Use of funds

- Acquisition of a main residence Construction of a main residence
 Conversion works in the main residence
 Reimbursement of a loan (excluding mortgage interest, default interest or mortgage commissions encumbering a main residence)
 Purchasing share certificates in cooperative housing associations intended for a main residence

Pension funds must be used solely for a residence for the own needs of the insured person, that is, it has to be a property at their own place of residence or normal place of abode. The funds cannot be used for a vacation home, even if this is intended to be used one day as main residence. It is not possible to buy a building property without a plan to build a home on it. **By returning this form, I confirm that the property mentioned below is my main residence.**

Exact housing address

Street:
ZIP, city: Country:

Please provide the new address when it becomes valid.

Owner of the property

- I am the sole owner of the property
 I am co-owner (owner of a share quota) of the property with:
 my spouse/registered partner my cohabitee other:
 I am common owner of the full property with my spouse/registered partner
Any other ownership forms are excluded to benefit of withdrawal.

Amount and date of withdrawal

- Total amount available CHF

NB : the minimum amount of withdrawal is CHF 20'000.00, except from vested benefits policies.

Requested payment date:

Payment term: 10 working days from receipt of the complete dossier.

Payment details for withdrawal

IBAN no:
Name of financial institution:
ZIP, city: Country:
Account holder: vendor lender or mortgage lender notary contractor
Full name of the account holder:
Street:
ZIP, city: Country:



Remarks for foreign payments

Currency of the account into which the funds must be transferred: CHF Euro

Please provide a bank account identity with IBAN, SWIFT numbers corresponding to the above currency.

Address of the notary (in case of acquisition and/or construction)

Full name:

Street:

ZIP, city: Country:

Taxation

- I am domiciled in Switzerland and the property for which I am applying for withdrawal is located in Switzerland.
I take note that the withdrawal will be declared to the tax authorities via Profelia, in accordance with the federal legislation on occupational benefits. At the time of payment, the withdrawal will be subject to tax as a lump sum benefit from the pension plan. The tax due will have to be paid out of my own funds and cannot be levied on the withdrawal.
- I am domiciled abroad and/or the property for which I am applying for the withdrawal is located abroad.
I take note that the withdrawal will be declared to the tax authorities via Profelia, in accordance with the federal legislation on occupational benefits. At the time of payment, a withholding tax will be deducted from the withdrawal. To allow Profelia to determine the applicable rate, I confirm that my personal situation is as follows:
 - single person (single, widowed, divorced or separately taxed)
 - single person bringing up a minor child, who is in an apprenticeship or studying
 - married person living in the same household.

In some cases, the tax reimbursement can be claimed within three years. An official reimbursement request form will be enclosed to the withholding tax certificate.

Signatures

I hereby certify that all the information provided in this form is correct and true.

I am aware that if this document is filled out inaccurately or incompletely, the pension fund may delay or even exclude the withdrawal. In particular, I take note that I am obliged to produce all the necessary supporting documents or means of proof.

I have also taken note of the significant consequences of a withdrawal imposed by the law:

1. The withdrawal will result in a reduction of projected retirement benefits.
2. The withdrawal may result in a reduction in benefits in the event of death and disability. You have the possibility to compensate all or part of this potential pension gap by taking out supplementary insurance with an insurance company. Our advisors will be pleased to provide you with an individual offer from Retraites Populaires.
3. For residential properties in Switzerland, Profelia will request the entry of a restriction on the sale of the property from the land register. With respect to properties abroad, we inform you that upon receipt of your dossier, an agreement for reimbursement abroad will be sent to you by postal mail that we ask you to return to us duly signed for agreement. The payment can only be made after receipt of this document.
4. If the withdrawal is reimbursed to the pension fund, you will have the opportunity to request a reimbursement of the tax paid without interest. The entitlement to a reimbursement of the tax paid shall expire three years after the reimbursement of the withdrawal.

.....
Place and date

.....
Signature of the insured person*

The spouse/registered partner is full knowledge of the consequences arising from the withdrawal by his/her spouse's/registered partner's benefits and gives his/her consent.

.....
Place and date

.....
Signature of the spouse*/registered partner*

* See on the next page the supporting documents to be provided.

This form can be returned to us via your Espace personnel. If the legalisation of signatures is necessary, this must be done before sending the form.

Supporting documents to be provided (essential for the processing of your dossier)

1. For the legalisation of signatures

All relevant information can be found in the enclosed notice:
Marital status and consent of spouse/registered partner

2. For the withdrawal request

- Present form duly completed, dated and signed
- Confirmation letter of the use of the funds from the bank or notary
- Extract from the land register or copy of the preliminary purchase agreement
- Proof of payment of the processing fee, i.e. CHF 300.00 for withdrawal (IBAN no CH44 0900 0000 1017 5419 7).

Other documents to be provided to us according to the reason for withdrawal

- a. Construction
 - Certificate of the date of works completion.
- b. Works, conversions
 - Construction works certificate, detailed cost estimate, etc
- c. Loan reimbursement
 - Loan agreement
 - Confirmation from your mortgage bank of the value of the loan as of today.
- d. Purchase of shares
 - Regulations or statutes of the housing cooperative
 - Original shares.